

Request Fulfillment Process Update

Project Charter



Consolidated Technology Services • WA

June 18, 2014

Version 1.1

Document History

Version Number	Date	Description	Revised By
Version 0.1	5/14/14	Initial draft for Project Team review	Laura Parma
Version 0.2	6/9/14	Review based upon feedback from CTS Management Team	Laura Parma
Version 1.0	6/18/14	Reviewed and Finalized between Julie Hindman and Laura Parma	Julie Hindman
Version 1.1	6/23/2014	Minor updates made to correct mistakes	Julie Hindman



Washington State
Department of Consolidated Technology Services
Project Management Team
1500 Jefferson St SE
Olympia, WA 98501

Table of Contents

Project Statement.....	4
Vision.....	4
Background / Business Drivers.....	4
Objectives & Key Deliverables.....	5
Schedule	6
Cost Projection	6
Scope	7
Out of Scope	7
Roles & Responsibilities	7
Team Composition.....	8
Approach	8
Project Strategy	8
Management & Implementation Approach	9
Team Approach.....	9
Dependencies, Assumptions, Constraints & Risks	9
Dependencies.....	9
Assumptions.....	9
Risks.....	10
Approval	11

Project Statement

The objective of this project is to improve the Request Fulfillment Process at CTS. The Request Fulfillment Process is defined as the process our Customers use to submit service requests to CTS and how those requests are processed to completion. The project will include reviewing the current request fulfillment process, identifying needed changes to the process, implementing the identified changes, and training CTS employees. The goal will be to implement a better process that improves the overall customer experience.

The projected cost of the project is estimated to be \$103,600 in staff time.

Vision

The refinements to the request fulfillment process will improve the overall process and the communications customers receive regarding their submitted requests. Customers will receive updates when their request has been assigned to a technician, customers will be part of negotiating a target completion date, and they will receive regular updates regarding the status of their request. Finally, before a request will be deemed completed, the customer will be asked for feedback regarding whether their request was satisfactorily addressed.

Background / Business Drivers

Based on the feedback CTS has received over the past twelve months, customers are concerned about the level of communication they receive regarding submitted service requests. Customers have even described the experience as the “black hole.” A customer will submit a service request, receive a notification back from the Service Desk that the ticket has been opened including a ticket number. What happens next is inconsistent. The customer may be contacted by the assigned CTS person via phone or email. The customer may receive status of the service request processing. The customer may not be contacted, which initiates an inquiry with the Service Desk to get status on the ticket.

Project Approach

In order to change this experience, and establish a consistent expectation regarding service request processing, CTS will conduct a review of the ITSM Request Fulfillment process. The review will include participation from CTS teams and customers. The review will consist of a look at the current request fulfillment process, updating the process to improve the customer experience, the creation of process documentation, and required training on the process for CTS team members. The assessment will include how Infra ticket queue monitoring is currently performed.

Gaps already identified to be reviewed include:

- Lack of initial contact by CTS ticket owner with the customer
- Lack of confirmation of scope of the request
- No negotiated due date for the service request
- Lack of timely and proactive status regarding the fulfillment of the service request
- Lack of agreement with the customer that the request has been satisfied and can be closed.

Objectives & Key Deliverables

Following are the project objectives with the associated key deliverables.

PROJECT OBJECTIVES AND KEY DELIVERABLES Phase 1

Objectives –
Deliverable # Description

Objective 1: Employ Project Management Best Practices throughout the Project Lifecycle

Deliverable 1.1	Project Charter
Deliverable 1.2	Project Schedule – Work Breakdown Structure (WBS)
Deliverable 1.3	Project Management Plans (Issue and Change Management Plans)
Deliverable 1.4	Post Implementation Review and Lessons Learned
Deliverable 1.5	Communication Plan

Objective 2: Train CTS on base expectations for Request Fulfillment Process

Deliverable 2.1	Training Materials for Service Owners
Deliverable 2.2	Training Materials for CTS Service Desk/Command Center
Deliverable 2.3	Training Materials for CTS Agency
Deliverable 2.4	Training Schedule
Deliverable 2.5	Training Materials for Customers
Deliverable 2.6	New Employee Training

Objective 3: Creation of Request Fulfillment Process Flow

Deliverable 3.1	Determine Process changes to Request Fulfillment
Deliverable 3.2	Process flow of Request Fulfillment Process based on Customer Input

Objective 4: Develop Request Fulfillment “Kit”

Deliverable 4.1	Templates for Communication
Deliverable 4.2	Templates to capture required request information

Schedule

The preliminary project schedule is 6 months from May 2014 through October 2014. The schedule may change when the work breakdown structure (WBS) is fully developed. The following chart shows a high-level project timeline.

ID	Task Name	Start	Finish	Q2 14		Q3 14			Q4 14
				May	Jun	Jul	Aug	Sep	Oct
1	Project Initiation	5/12/2014	6/30/2014						
2	Project Planning Phase	7/2/2014	7/29/2014						
3	Project Implementation	7/30/2014	8/12/2014						
4	Training – CTS Staff	8/14/2014	9/24/2014						
5	Roll-Out Changes	9/25/2014	10/8/2014						
6	Project Closure	10/8/2014	10/21/2014						

Cost Projection

The projected project cost is \$103,600 representing project resources listed:

COST DESCRIPTION	TOTAL
HUMAN RESOURCES	
❑ 1 Project Sponsor – 6 months (15%)	\$14,000
❑ 1 Project Manager –6 months (15%)	\$11,000
❑ 1 Technical Writer – 4 months (20%)	\$9,700
❑ 1 Service Desk Manager – 5 months (15%)	\$9,100
❑ 3 Customer Account Managers – 5 months (15%)	\$27,900
❑ 1 HR Rep– 5 Months (5%)	\$2,900
❑ 4 Service Team Representative – 5 months (15%)	\$29,000
HUMAN RESOURCES TOTAL	\$103,600
TOTAL PROJECTED COST	\$103,600

Scope

In Scope

- Identifying changes to Request Fulfillment process
- Implementation of a New Request Fulfillment process
- Training of CTS members impacted by the process

Out of Scope

- Request fulfillment outside of request submitted to CTS Service Desk (i.e. Internal Project Requests to PMO)

Roles & Responsibilities

The table below shows the roles and responsibilities for resources assigned to the project.

Role	Responsibilities
Executive Sponsor	<ul style="list-style-type: none"> • Champions the project and its priority within the agency • Provides executive leadership and guidance for the project • Approves charter – scope, schedule and budget • Approves changes to scope, schedule and budget • Acts as point of escalation for project issues and decisions • Approves key deliverables
Project Sponsor	<ul style="list-style-type: none"> • Approves charter – scope, schedule and budget • Approves key deliverables • Acts as point of escalation for project issues and decisions • Provides guidance to the project team and workgroups • Escalates issues and decisions to the Executive Sponsor and Steering Committee as needed
Project Manager	<ul style="list-style-type: none"> • Creates project management plans • Schedules and facilitates meetings • Acts as point of escalation for project issues and decisions • Manages day to day project activities and monitors the work plan to ensure assigned tasks stay on schedule • Monitors the quality, timely completion of deliverables • Coordinates the review and approval of deliverables • Escalates issues and decisions to the Sponsor as needed • Creates and distributes status reports
Project Team	<ul style="list-style-type: none"> • Creates assigned deliverables • Reviews deliverables • Provides CTS subject matter expertise • Completes tasks assigned in the work plan • Reports progress on assigned tasks • Escalates issues and decisions to the Project Manager as needed

Team Composition

The table below shows each person assigned as a resource to the project and what role they have.

Name	Percent Allocated	Number of Months	Executive Sponsor	Sponsor	Project Manager	Project Team	Subject Matter Expert
<i>Christy Ridout</i>	N/A	N/A	✓				
<i>Laura Parma</i>	15%	6		✓		✓	✓
<i>Julie Hindman</i>	20%	6			✓	✓	✓
<i>Titus Mutchler</i>	15%	5				✓	✓
<i>Debbie Kendall</i>	15%	5				✓	✓
<i>Steve Lovaas</i>	15%	5				✓	✓
<i>Larry Lee</i>	15%	5				✓	✓
<i>Lauren Ferriby</i>	15%	5				✓	✓
<i>Service Owner Representatives</i>	15%	5				✓	✓

Approach

Project Strategy

Successful implementation is highly dependent on CTS resource availability to perform the project tasks as defined in the work plan. The Project Team will work closely with CTS key representatives to plan the project and identify project requirements, dependencies, risk, assumptions and constraints.

The Project Team will develop a Communication Plan in order to identify the way the team will communicate with senior management and key stakeholders. Project processes will be established and followed for reviewing and approving deliverables, scope and change management, risk management and issue management.

Project issues and needed decisions will be reported to the Project Manager. Issues and decisions, when possible, will be resolved at the lowest level with help from the Project Team and Workgroup members. Issues and decisions that can't be resolved at this level will be escalated to the Sponsor by the Project Manager. Issues and decisions that can't be resolved at the Sponsor level will be escalated to the Executive Sponsor and Steering Committee by the Sponsor.

Coordinated project work plans with dependencies will be developed and maintained by the CTS project manager.

Management & Implementation Approach

The following project management artifacts will be developed in the planning phase to define strategy for communication, and project management. Project Management artifacts include:

- Project Charter
- Project Schedule – Work Plan (WBS)
- Project Management Plans: Issue Management Plan and Change Management Plan, Communication Plan

Project risks, issues and changes will be tracked and managed using lists on the Project SharePoint Site.

The Project Team members identified in the project WBS will execute identified tasks to support the project and facilitate transition to service.

Team Approach

The project team will meet regularly and will participate in all project phases. Subject Matter Experts will provide expert knowledge to the Project Team as needed.

Dependencies, Assumptions, Constraints & Risks

Dependencies

In order for the project to be successful, the following events need to occur that are outside of the total control of the project:

- Training Room availability to host training class twice a week over 6 weeks

Assumptions

The Project Team has made the following assumptions, which are contingent to successfully completing the project within the estimated timeframe.

- Strong project sponsorship to support organizational change management
- Service Owners and agency team members will adopt the changes to the process and procedures
- CTS staff can be available to take 2 hour training course
- Customers will be available for participation and input

Risks

In developing the Project Charter, the Project Sponsor has identified project risks and rated the **Probability** of occurrence and the **Severity** as shown below.

Identified risks are measured by **Probability** and **Severity** and each are measured on a scale of Low, Medium and High (L/M/H).

Risks with **Probability** and **Severity** ratings of L/L, L/M, L/H, H/L and M/L are considered on the low end of the risk scale and mitigation action is not required. Risks with **Probability** and **Severity** ratings of M/M, M/H, H/M and H/H are on the medium to high end of the scale and require mitigation plans or strategies.

Risk Description	Probability (L/M/H)	Severity (L/M/H)	Risk Mitigation
			1.
			1.
			1.
			1.

Approval

The project charter has been reviewed and accepted as written. Approval is given to move forward with the project as outlined in this document.

Christy Ridout
Executive Sponsor

Date

Laura Parma
Project Sponsor

Date

Julie Hindman
Project Manager

Date